

**CLASS TITLE: TAXPAYER ASSISTANCE REPRESENTATIVE SUPERVISOR  
(TAXATION)**

**Class Code: 02687102  
Pay Grade: 28A  
EO Code: B**

**CLASS DEFINITION:**

**GENERAL STATEMENT OF DUTIES:** Within the Department of Revenue (DOR) Division of Taxation, to plan, organize, monitor, and supervise the work of a staff engaged in assisting taxpayers and their representatives in understanding and meeting their tax responsibilities; to be responsible for the effective and efficient operation of the Taxpayer Experience Section; to routinely examine issues and resolve a variety of difficult and complex taxpayer assistance cases; to assist superiors in the development of policies, rules, and regulations necessary for the effective implementation of customer experience-related functions through the organization of staff and operations as well as the development of policies and procedures based on best practices; and to do related work as required.

**SUPERVISION RECEIVED:** Works under the general direction of a superior with wide latitude for the exercise of initiative and independent judgement; work is reviewed seldomly upon completion for performance of assignments as directed, but at times may be reviewed for results obtained and conformance to laws, regulations and procedures.

**SUPERVISION EXERCISED:** To plan, organize, and supervise the work of staff within the Taxpayer Experience Section; reviews work in process and/or upon completion.

**ILLUSTRATIVE EXAMPLES OF WORK PERFORMED:**

Within the Department of Revenue (DOR) Division of Taxation, to plan, organize, monitor and supervise the work of a staff engaged in assisting taxpayers and their representatives in understanding and meeting their tax responsibilities.

To be responsible for the effective and efficient operation of the Taxpayer Experience Section.

To routinely examine issues and resolve a variety of difficult and complex taxpayer assistance cases.

To assist superiors in the development of policies, rules, and regulations necessary for the effective implementation of customer experience-related functions through the organization of staff and operations as well as the development of policies and procedures based on best practices.

To assist a superior in planning, monitoring and organizing customer service-related tasks administered and provided by the Division.

To regularly evaluate current procedures and make recommendations to a superior concerning the continuous improvement and optimization of services offered.

To plan for and execute processes, resource utilization and contingencies during peak demand of services inquiries to ensure consistent and effective service levels

To provide support, guidance and coaching to Taxpayer Assistance Representatives; as assigned, to provide support, guidance and coaching to other Taxation staff.

To oversee, plan and execute formal and/or informal training programs for new and existing customer experience staff.

To monitor feedback related to customer service functions in the Section and Division.

To assist in establishing best practices and accompanying metrics to measure success.

To provide information about laws, rules, regulations, and policies/procedures to taxpayers and other interested parties to facilitate their understanding and compliance; to assist in the creation of outreach materials to aid taxpayer education

To respond to inquiries and to direct them to the proper location for response when necessary.

- To handle and resolve escalated customer experience inquiries.
- To attend conferences and meetings on behalf of a superior and prepare reports thereon.
- To study and analyze operational procedures and prepare detailed and comprehensive reports of findings and recommendations.
- To assist a superior by performing administrative tasks and research in the overall section operations.
- To participate in and/or lead group projects and special assignments as needed.
- To do related work as required.

## **REQUIRED QUALIFICATIONS FOR APPOINTMENT:**

**KNOWLEDGE, SKILLS AND CAPACITIES:** Advanced knowledge of and the ability to interpret and rapidly recall various state tax laws, regulations, practices and procedures; the ability to apply such knowledge in the planning, organization and supervision of a staff engaged in assisting taxpayers and their representatives in understanding and meeting their tax responsibilities; an ability to lead meetings and communicate with taxpayers and their representatives, including in stressful situations involving adverse actions on the part of the Division; the ability to address and resolve the most difficult and complex customer service matters; the ability to regularly evaluate current procedures and make recommendations on improvements and efficiencies; knowledge of the principles, practices and techniques of business management; ability and judgement to ensure that the tax laws, regulations, and procedures are interpreted with consistency and equity for all taxpayers; an advanced ability to provide clear and accurate information to taxpayers, their representatives, members of the public, and other interested parties in routine to the most complex circumstances; the ability to interact with applicants/recipients, the public and co-workers in a professional, tactful and courteous manner; advanced knowledge of Windows Operating Systems, usage of a personal computer (PC) and standard desktop office tools; capacity to navigate a computer while on the telephone and while providing in-person assistance; the ability to maintain a thorough knowledge of pertinent provisions of state tax laws, rules and regulations; the ability to assist superiors in the development of policies, rules and regulations; the ability to communicate clearly and effectively in both verbal and written communications; the ability to utilize a variety of computer software in the completion of duties as well as to guide and coach other staff in the proper use of such software; and related capacities and abilities.

## **EDUCATION AND EXPERIENCE:**

**Education:** Graduation from a college of recognized standing with a Bachelor's degree in Accounting, Finance, Economics, Mathematics, Business, Business Administration, Marketing, or a closely related field; and

**Experience:** At least five (5) years of employment involving the supervision of staff engaged in customer-related services in the field of taxation.

**Or,** any combination of education and experience that shall be substantially equivalent to the above education and experience.

Class Created: November 21, 2021